



# Open Enrollment Checklist

## ENROLL ON-LINE THROUGH eWay:

### Logging-On

1. Logon to the eWay landing site: [www.csj.gov/eWay](http://www.csj.gov/eWay)
2. Click on **eWay** at the top of the page.
3. **Logon to PeopleSoft – New User Logon**  
*Instructions* are available on the eWay site. (If you know how to log-on but your password has expired or you've forgotten your password, use CityPass - <https://citypass.sjcity.net/> - to reset your password. Call the IT Help Desk at 793-6900 if you need further assistance).
4. In PeopleSoft, take the following path:  
**Self Service > Benefits > Benefits Enrollment**

### Enrolling Online

1. Click **Benefits Enrollment**
2. Click the **Select** button
3. Click the **Edit** buttons to make changes:
  - ☐ **Medical, Dental, or Vision Plans**
    - o Choose a plan (including Waive or In-Lieu)
    - o Enroll or drop dependents - **Please see the updated Eligible Dependent Definition in the Employee Benefits Handbook.**
    - o Designate Primary Care Providers
    - o Click the **Store** button
    - o Click the **OK** button
  - ☐ **Employee Assistance Plan (EAP)**
    - o *Eligible employees are automatically enrolled*
    - o Enroll or Drop Dependents
    - o Click the **Store** button
    - o Click the **OK** button
  - ☐ **Medical Reimbursement Account (MRA)**  
Must re-enroll each year
    - o Select Medical Reimbursement Plan
    - o Designate an Annual Pledge (\$2,500/Yr. Max)
    - o Click the **Store** button
    - o Click the **OK** button
  - ☐ **Dependent Care Assistance Plan (DCAP)**  
Must re-enroll each year
    - o Select Dependent Care Assistance Plan
    - o Designate an Annual Pledge (\$5,000/Yr. Max)
    - o Click the **Store** button
    - o Click the **OK** button
4. Once you complete your enrollment changes, click the **Submit** button to finalize your enrollments.

**You must click the SUBMIT button and check all disclosure boxes for enrollments to take effect.**

## ADDITIONAL ENROLLMENT OPPORTUNITIES:

### **Trustmark Voluntary Insurance Products**

Trustmark is our new accident and critical illness & cancer insurance provider for 2011. If you wish to enroll in Trustmark Voluntary Insurance or speak to an Enrollment Counselor, you can schedule an appointment near you or at Human Resources at:

<https://www.myenrollmentschedule.com/sanjose> or by calling 1-866-998-2915.

Enrollment Counselors will be available in the Human Resources lobby (City Hall Wing, 2<sup>nd</sup> Floor) throughout Open Enrollment.

### **SUBMIT REQUIRED PAPERWORK TO EMPLOYEE BENEFITS:**

- ☐ **Marriage Certificate**
- ☐ **Birth Certificate**
- ☐ **Social Security Number**
- ☐ **Affidavit of Domestic Partnership**  
If you enrolled a Domestic Partner and/or your partner's children (not your naturally-born, adopted, or guardianship dependents), you must submit a completed Affidavit of Domestic Partnership to Employee Benefits **within 2 weeks of enrollment** to get coverage.
- ☐ **Full Time Student Status Verification**  
Please see the updated FT Student Status Verification Policy.

### **Submit the required paperwork to:**

Human Resources – Employee Benefits  
200 E. Santa Clara St, 2<sup>nd</sup> Floor Wing  
San Jose, CA 95113  
**Fax: (408) 999-0862**  
**e-mail: [benefits@sanjoseca.gov](mailto:benefits@sanjoseca.gov)**

### **FOR MORE INFORMATION:**

- ☐ **Contact Employee Benefits:**
  - o Phone: (408) 535-1285
  - o E-mail: [benefits@sanjoseca.gov](mailto:benefits@sanjoseca.gov)
- ☐ **Open Enrollment Desk hours:**  
Human Resources office-City Hall Wing, 2<sup>nd</sup> Floor  
**Nov 1 – Nov 30      8 am – 5 pm**